

The Solution Your Legal Department Has Been Looking For

In my experience every Legal Department has users who previously worked at a law firm, where they used a traditional DM system to manage their documents and often their emails as well. By 'traditional DM system' I am referring to products such as iManage Filesite / Desksite®, OpenText eDocs®, Hummingbird DM (the predecessor of OpenText eDocs) and Documentum®.

Based on that experience users at Legal Departments have definite expectations as to how documents should be saved, retrieved and generally managed. Often when they move from a law firm to a Legal Department those users have to make do with Windows file shares and Outlook folders, which they find unsatisfactory for a number of reasons, including:

- No metadata capture and as a result much less efficient searching
- No unique numbering of documents
- Documents cannot have multiple versions
- No checking out to reserve a document for update
- No check-in to control when a new version is made available to other users

Then someone suggests that the Legal Department folks try using Microsoft SharePoint. It is true that SharePoint has document management capabilities – including metadata capture, check-out / check-in, versioning, unique document numbering and searching. However the reaction from the Legal Department when they try to use SharePoint out-of-the-box is that it is clunky to use and lacking in some important features that they remember from their earlier experience with a traditional DM system.

MacroView Case and Matter enhances and extends SharePoint and its integration with Microsoft Office to provide the user experience and the DM functionality that the Legal Department is looking for. Because Case and Matter uses the SharePoint infrastructure that is already installed in many organizations it is also cost effective.

Microsoft Outlook to be my DM Desktop

Like a lot of business users, lawyers spend a lot of time in front of Outlook. Vendors of traditional DM systems know this, which is why they all provide integration so that you can perform document management tasks while you work in Outlook. The OOB integration of Outlook and SharePoint leaves a lot to be desired, such as easy ways of navigating and visualizing the SharePoint document store from Outlook and dragging and dropping to save emails to the SharePoint document store.

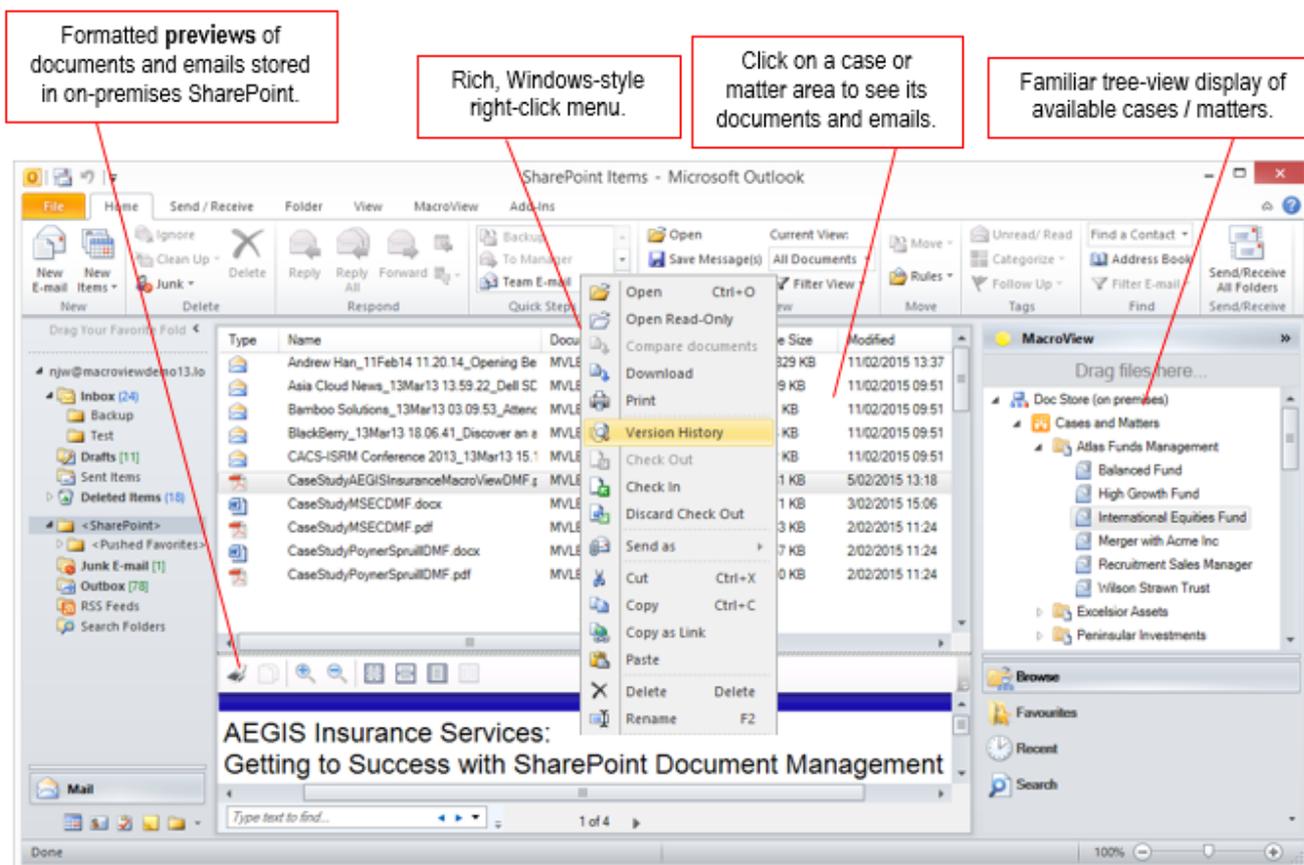
MacroView Case and Matter provides excellent integration between Outlook and a SharePoint document store. It satisfies the needs of Legal Department users, who want 'Outlook to be their DM Desktop'.

Once MacroView Case and Matter is installed you can interact with the SharePoint document store in four different modes: *Browse*, *Favorites*, *Recent* and *Search*. The *Browse* and *Favorites* modes provide a tree-view display of the structure of the SharePoint document store, which makes SharePoint feel as familiar as viewing the folder structure of a Windows file share or Outlook.

Search mode lets you search for documents and emails that are stored in SharePoint, while you continue to work in Outlook. A good search experience is particularly important to users (like Legal Department users) who have previously used a traditional DM system.

When you click on an area of the SharePoint store, MacroView Case and Matter displays the list of documents / emails that are stored in that area. As the screen shot below shows, that file list display is located in the main pane of Outlook and it shows the Views that have been created for the SharePoint areas. You can sort and filter the file list and see formatted previews of the files. If you right-click on a file MacroView Case and Matter displays a rich menu of available options – something that is familiar to any user of a Windows file share and much more comprehensive than the right-click menu of OOB SharePoint.

MacroView Case and Matter lets you manage and work with documents in SharePoint directly from Outlook.



Using MacroView Case and Matter in Outlook to view documents and emails for a Matter

The solution needs to be Matter Centric

Legal users generally want to be able to view a DM store as being organized into Matters, and expect to be asked to identify a Matter when they save a document or email. Some traditional DM system support 'Matter folders' – dragging and dropping to the folder for a Matter removes the need to pick that Matter in the profiling (metadata capture) dialog. Users appreciate this reduction in profiling effort.

MacroView Case and Matter supports this Matter folder concept. For each Matter It actually uses a SharePoint document set, which is a specialized form of folder that is able to have its own metadata attributes and to share those attributes with the documents and emails that are stored for the Matter. As a document or email is saved to a Matter (see Drag and drop to save documents and emails_below) metadata such as *Matter Name*, *Matter Manager*, *Matter Status* and *Matter Type* are automatically recorded. These automatic metadata attributes can also be used when searching for documents and emails.

The automatic creation of this Matter document set structure as MacroView Case and Matter is installed is described below under Automated Installation and Provisioning.

MacroView Case and Matter can cope with thousands of Matters and millions of documents and emails in its SharePoint document store.

The *Favorites* mode of MacroView Case and Matter makes it quick and easy to find and work with the Matters that you use frequently. The *Recent* mode does the same for Matters that you have worked with recently. You can add an area as a Favorite yourself, or alternatively Favorites can be automatically created for you.

The *Browse* mode of MacroView Case and Matter allows to find and navigate rapidly to any area of the SharePoint store for which you have access permission – e.g. to the area for a Matter that you have not used previously.

The same modes of interaction – *Browse*, *Favorites*, *Recent* and *Search* – are also available when you work in Outlook, Word, Excel, PowerPoint, Adobe Reader / Acrobat and in Windows itself. This consistent user experience is something else that Legal Department users expect.

Help with managing the matters, not just their documents and emails

Over time a Legal Department will work on a range of different Matters – in some cases hundreds or even thousands of Matters in a single Year. In addition to managing the documents and email for these Matters, MacroView Case and Matter also assists with the management of Matter areas themselves. This includes:

- Finding the area of a Matter that you want to work,
- Creating the area for a new Matter and
- Archiving a closed Matter

To find the area for a Matter you use the same techniques as for finding a document or email. You can use a Matter library to store all the Matters that relate to a particular Business Unit, Client, Year, etc.

The *Search Site Tree* command of MacroView Case and Matter makes it easy to find and locate to a particular area of the SharePoint store – e.g. the area for a Matter. This command performs well, even when the SharePoint store contains many thousands of Matters.

A Legal Department user can create the storage area for a new Matter by right-clicking on a Matter Library and choosing *Create New Matter*. The user will be prompted for details of the new Matter. MacroView Case and Matter will share this metadata with any documents or emails that are subsequently stored for the Matter. MacroView Case and Matter will automatically append the Matter Number to the name of the new Matter area.

Right-click, *Create New Matter* dialog

If you right-click a Matter area and choose *Archive Matter*, the Status of the Matter will be set to *Archived* and all documents and emails that have been stored for the Matter will be declared as records. The record declaration process occurs as a background task and once it is complete the documents and emails are protected from being altered or deleted.

This is the out-of-the-box archiving process, which can be replaced by a custom alternative process if desired – e.g. one that involves moving archived Matters to another part of SharePoint.

Drag and drop to save documents and emails

While you work in Outlook you can drag and drop to save emails to any area of the SharePoint store where you have appropriate permissions. The emails can be from any Outlook folder. MacroView Case and Matter provides excellent support for drag and drop saving of multiple emails – the save proceeds in the background so that you can continue working in Outlook, including to save additional emails.

You can drag and drop to save emails, attachments and files in any Windows folder – and also to move or copy documents between areas in the SharePoint store.

Depending on configuration, emails that have been saved are either marked with a yellow *Saved to SharePoint* category or deleted from the Outlook folder. MacroView Case and Matter automatically names the files that contain the saved emails to prevent duplicate copies of an email in any one SharePoint area.

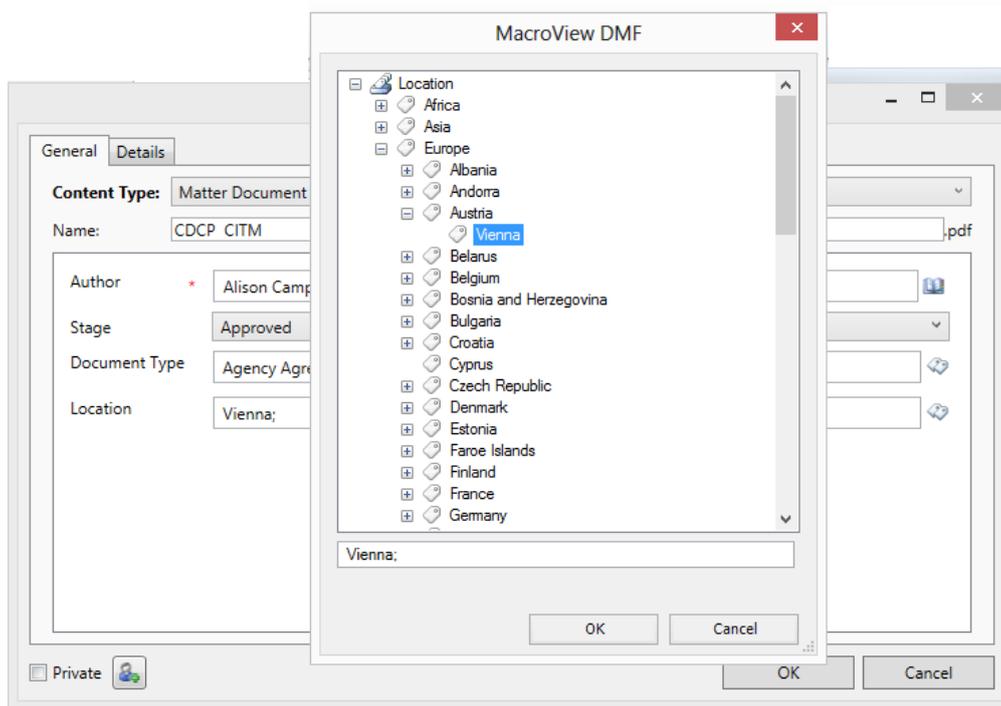
You can drag and drop to save one or more attachments of an email. You can also drag and drop files from any Windows file share into areas displayed in the *Browse* and *Favorites* modes to save those files to SharePoint.

MacroView Case and Matter also lets you drag and drop to move or copy documents and email from one area of SharePoint to another. Unlike the OOB SharePoint user interface, the destination area for a move can be in another site, another site collection, or even a different web application. As it moves a document MacroView Case and Matter can reuse existing metadata to satisfy the requirements of the destination area. If versioning is configured, MacroView Case and Matter will retain existing version history and automatically create a new version to provide a record of the move.

Profiling (metadata capture) must be intuitive, preferably automatic

Users with previous experience of a traditional DM system are well used to profiling a document as it is saved – i.e. being prompted for metadata attributes to be recorded for the document. These users recognize that the additional metadata can assist in later finding of the document.

With MacroView Case and Matter this capture of metadata is more streamlined than with many traditional DM system implementations. The main reason for this the way MacroView Case and Matter assigns automatic metadata as a user drags and drops to a Matter area displayed in *Browse* or *Favorites*. This automatic metadata removes the need to pick values for *Matter Name* and other metadata attributes.



Profiling dialog of MacroView Case and Matter, choosing a value for a hierarchical *Location* attribute

The metadata capture experience is also improved by the way MacroView Case and Matter supports Managed Metadata columns based on hierarchical Term Sets. Values can be selected quickly by using type-ahead and the hierarchical structure of valid values nicely reflects many business situations – e.g. *Location* can be classified in multiple levels as in the screen shot above.

The valid values for these Managed Metadata attributes are maintained centrally, which provides a consistent user experience and reduces maintenance. Suitably authorized users can even add additional valid values to the central Term Store as they profile a document.

As it saves emails, Case and Matter automatically records to, From, Subject etc. as metadata.

As it saves emails to the SharePoint DM store, MacroView Case and Matter automatically records their attributes (e.g. *To, From, Subject*, etc.) as metadata. Matter areas are created in such a way that there is zero profiling as a user saves emails – i.e. all metadata is recorded automatically without any profiling dialog being displayed.

When it comes to capturing metadata, one of the real advantages of SharePoint is that different areas of the document store can have quite different metadata designs. MacroView Case and Matter lets a Legal Department take full advantage of this metadata design flexibility. For example, areas for storing Marketing, HR or Finance documents and emails do not need to have the Matter metadata attribute. This addresses one of the key frustrations often reported by administration areas when using a traditional DM system in a legal firm, which is the need to supply a 'dummy' Matter code (e.g. 00000 or 99999) every time they save a document.

Search for documents and emails without leaving Outlook, Word, Excel or PowerPoint

MacroView Case and Matter makes it convenient and intuitive to search for documents that are stored in SharePoint. The search can be based on metadata (profile) attributes and also on content within the documents or emails (or their attachments). You can do these searches while you work in Outlook, Word, Excel, PowerPoint and the MacroView DMF Explorer application in Windows.

Not having to leave the application where you are working and jump to the web browser to search is one of the things that business users like best about MacroView Case and Matter, as compared to the OOB SharePoint user experience. You can select the type of search you want to perform and the list of available Search Types can readily be extended by an organization.

Type	Name	Document ID	Client	Matter Name
	Configuring the MacroView Pane.docx	MVLEGAL-236079263	76001139733 - Hargreave Secur	1151113767 - OHS Claims
	Configuring the MacroView Pane.docx	MVLEGAL-236079212	17090975456 - Margin Lending I	287794318 - Share Float
	MacroView Message Tips and Tricks.docx	MVLEGAL-236079309	17090975456 - Margin Lending I	287794318 - Share Float
	MacroViewDMFMeetsNeedsLegalDM.docx	MVLEGAL-336080421	40082931806 - Lend Lease Singa	1002762859 - OHS Claims
	CreateLibraryScreenshots.docx	MVLEGAL-336081297	16098211922 - Astor Terrace Ape	1039619615 - Takeover

The screenshot also shows the 'MacroView Search Tools' ribbon with options like 'Matter Search', 'Document Search', and 'Email Search'. The search results panel on the left includes filters for Server, Client, Matter Name, Matter Type, Matter Status, Document Name, Document ID, Document Type, Document Author, Modified Date, Result type, and All of these words.

Using the *Matter Search* feature of MacroView Case and Matter in Microsoft Word

The screen shot above shows a *Matter Search* working in Microsoft Word. *Matter Search* is a Search Type that ships with MacroView Case and Matter.

You can see formatted previews of search results, double-click to open a search result in the relevant application (e.g. DOCX files open in Microsoft Word) and right-click on a search result to be navigated to the area in SharePoint wherein the search result is located – e.g. to the area for a Matter. Once you find a document or email for a Matter this lets you can see all the documents and emails that have been stored for that Matter!

With the *Matter Search* panel that ships with MacroView Case and Matter you can specify values for *Document Type* using the same techniques that you use for capturing a value for *Document Type* as you save a document. You can type ahead

to select values from a hierarchical set of valid values. This consistency of user experience is a real positive for user adoption of MacroView Case and Matter.

Behind the scenes the search is powered by the SharePoint Search engine – you don't need to schedule any different crawls or have any additional servers.

Legal-style Document Numbering

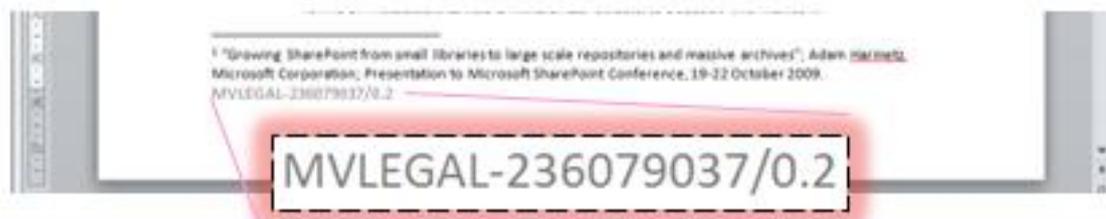
Based on their experience with traditional DM systems Legal Department users expect that documents are assigned a unique document ID as they are saved to the DM store and for documents to be numbered sequentially across the whole DM store. They also expect that the Document ID and possibly other document details (e.g. the current Version) to be automatically displayed in the footers of documents that are opened from the DM store.

With MacroView Case and Matter unique document numbering works like a traditional DM system.

While OOB SharePoint does have unique Document IDs, those IDs are not as a Legal Department user would expect. OOB SharePoint Document IDs have a three part coordinate structure: <Site Collection Prefix>-<ListID>-<ItemID>. As a result multiple documents across the document store could have the same number.

MacroView Case and Matter arranges for unique Document IDs to be structured as Legal Department users expect. The further good news is that Case and Matter replaces the OOB SharePoint unique numbering provider, which means that all documents are numbered as desired, regardless of how they are saved to SharePoint – i.e. they do not need to be saved using MacroView Case and Matter.

As documents are opened from SharePoint into Microsoft Word or Excel, MacroView Case and Matter automatically updates the document so that it displays the unique Document ID, current Version number and any other document reference metadata that has been configured. By default this document reference is displayed in the footer, but by using a Word field code it can be configured to be displayed at another position in the document.



MacroView Case and Matter automatically updates the footer to display the Document Reference

The document reference is also updated automatically as a new version of the document is checked into SharePoint – e.g. as you close the document. This means that the footers of Word and Excel documents in SharePoint are accurate, which is handy if the document is attached to an outgoing email. Yes, you can use a Word field code to display the value of Document ID, but unless you have MacroView the display will not be updated as you close and check in.

In short, MacroView Case and Matter enhances the unique numbering feature of SharePoint so that document numbering works as Legal Department users expect.

Excellent support for Check Out, Check In and Versioning

The ability to manage multiple versions of a document is a definite requirement for a Legal Department. Legal users generally are quite familiar with the concept of checking out a document when they want to edit it, and with checking in to create a new version or to replace the existing version.

From a distance it looks like OOB SharePoint might satisfy these expectations around versioning, check out and check in. SharePoint supports minor or draft versions, which are not supported by all traditional DM systems. However on closer encounter Legal users generally find that SharePoint does not provide the versioning, check out and check in experience that they expect.

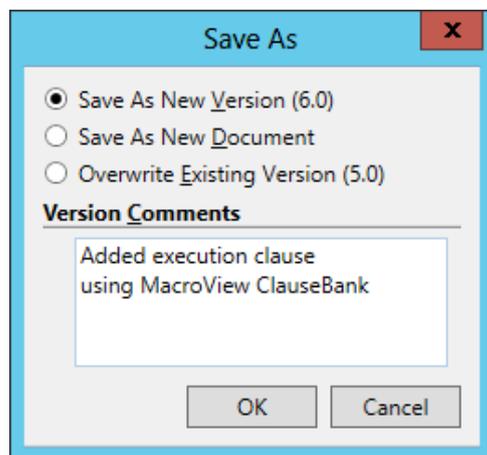
As you check out a document SharePoint automatically creates a proposed new version. However most legal users would expect the footer of the document to still

MacroView Case and Matter provides the options legal users expect as they close a Word document that they have edited.

display the most recently published Document ID. MacroView Case and Matter displays the version number that legal users expect.

As you close a document that you have opened and checked out from SharePoint, the OOB integration in Microsoft Word displays a tedious series of prompts, including the dreaded ‘Do you want to discard your checkout?’. I say dreaded because responding Yes discards not only the Check Out, but also all the changes that have been made to the document since it was checked out, regardless of how many time you clicked the Save button. This can lead to the inadvertent loss of days of work.

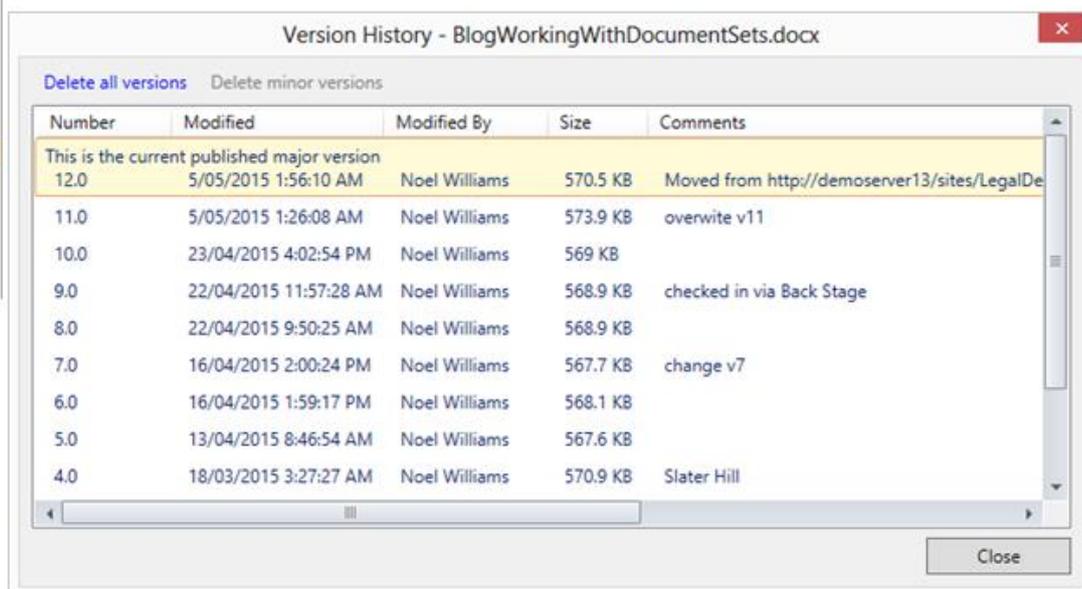
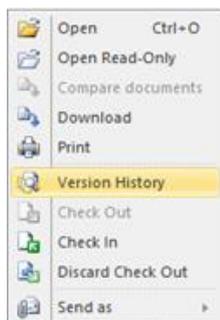
MacroView Case and Matter fixes this issue by displaying the following dialog as a document is closed after having been checked out and edited:



Familiar options displayed by MacroView Case and Matter as you close a Word document

Note that the dialog allows an existing Major version to be overwritten. This is not supported by the OOB integration of Word and SharePoint (only an existing Minor version can be overwritten), but it is supported by traditional DM systems. Legal users can readily identify scenarios where replacing an existing Major version is preferable to creating a new Major version to publish changes in a document.

MacroView Case and Matter also makes it convenient to inspect the version history of a document, and to capture comments as versions are created or overwritten.



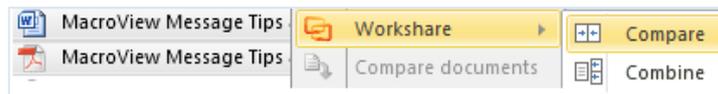
Right-click, Version History display for a document

Document comparison using Workshare (DeltaView)

The ability to compare two Word documents, or two version of a DOCX is a central requirement for legal users. The common practice of sending documents as PDFs adds another dimension to this, which is the need to compare a PDF with a DOCX,

or even two PDFs. To handle these document comparisons many Legal Department users would be familiar with using Workshare Compare (previously known as DeltaView) because of the large market share of this comparison product.

The ability to invoke Workshare Compare is available as an optional module of MacroView Case and Matter. If this option is installed you can select two documents, which can be either DOC(X) or PDF, and choose *Workshare, Compare*. The optional module also extends the operation of Workshare Compare in Word and in its standalone Windows app so that you can use the familiar MacroView dialog to locate and select the documents in SharePoint that you want to compare. MacroView dialogs also provide a familiar experience if you want to save a Comparison Report file to SharePoint.



Right-click, Workshare, Compare (optional feature of MacroView Case and Matter)

If you do not have the Workshare Compare optional module, MacroView Case and Matter makes it convenient to invoke the *Review, Compare* feature that is native to Word 2010 and 2013 – you simply select two documents in a MacroView file list and select *Compare*.

Audit History and Records Management Features

Legal Department users understand the need to be able to inspect the audit trail of a document, to apply Legal Holds to documents and to declare certain documents and emails as records (and thereby prevent amendment or deletion). Most traditional DM systems provide these audit and compliance features and they are also provided by MacroView Case and Matter.

Right-clicking a document or email and choosing *Audit* displays the audit trail of access and updates to the document. The details in this display can be copied to the Windows clipboard so that they can be pasted into an Excel workbook or similar.

 A screenshot of a window titled 'BlogWorkingWithDocumentSets.docx Audit'. The window contains a table with the following data:

Audit Event	Version	Occurred	User
View	12.0	1/07/2015 6:25:06 PM	Noel Williams
View	12.0	23/06/2015 3:46:39 PM	Noel Williams
View	12.0	23/06/2015 3:43:17 PM	Noel Williams
View	12.0	23/06/2015 3:43:02 PM	Noel Williams
View	12.0	23/06/2015 3:42:52 PM	Noel Williams
View	12.0	20/05/2015 10:48:56 PM	Noel Williams
View	12.0	20/05/2015 10:48:29 PM	Noel Williams
View	12.0	20/05/2015 5:09:58 AM	Noel Williams
Update	12.0	20/05/2015 3:47:56 AM	System Account
Update	12.0	20/05/2015 3:47:14 AM	System Account
Update	12.0	20/05/2015 3:46:32 AM	System Account
Update	12.0	20/05/2015 3:45:50 AM	System Account
View	12.0	19/05/2015 9:59:39 PM	Noel Williams
Update	12.0	19/05/2015 9:53:16 PM	System Account
Custom	N/A	19/05/2015 9:53:16 PM	Noel Williams
Update	12.0	19/05/2015 9:53:15 PM	System Account
View	12.0	19/05/2015 5:38:36 AM	Noel Williams
View	12.0	19/05/2015 5:28:54 AM	Noel Williams
Update	12.0	19/05/2015 5:28:47 AM	System Account
CheckOut	12.0	19/05/2015 5:28:47 AM	System Account

 The table has a 'Close' button at the bottom right.

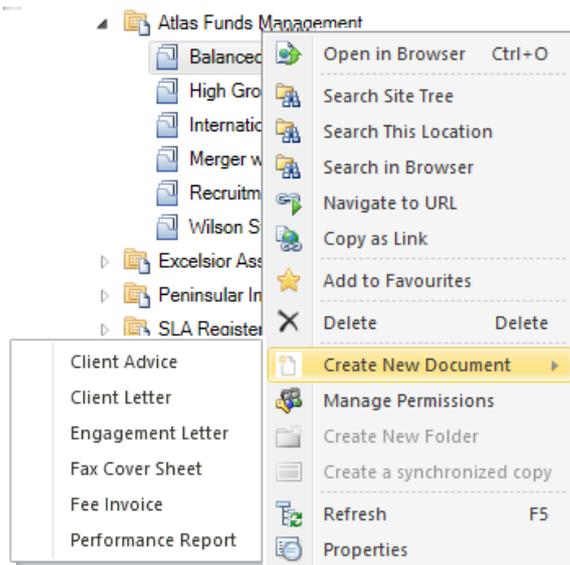
Right-click, *Audit* displays Audit trail for a document

The *Compliance* option that appears when you right-click a document provides sub-options for Apply / Remove Legal Hold and Declare as Record. Documents that are on-hold or declared as records are highlighted in the file lists display of MacroView Case and Matter.

Streamline the Creation (and Saving) of New Documents

MacroView Case and Matter doesn't just help with managing existing documents and emails – it can also streamline the creation of new documents, including saving and profiling those new documents in the SharePoint DM store.

When you right-click on a Matter area the menu displayed by MacroView Case and Matter includes a *Create New Document* option. Selecting this option displays a menu of available document types, which can be arranged as a tree structure to assist when selecting from a large number of document types. Additional document types can be added to this menu, simply by saving the relevant template in the appropriate folder. Several sample MacroView templates ship with Case and Matter.

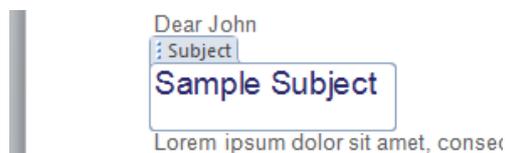


Right-click, *Create New Document* displays menu of available templates for document creation

MacroView Case and Matter sample templates show a range of techniques that make document generation and amendment both faster and safer.

The sample MacroView Letter template illustrates a range of techniques for specifying dates, selecting from drop-down lists, capturing multiple recipients and integrating with Outlook Contacts and other data stores. The generated document is automatically stored in the Matter area, and metadata attributes such as *Document Type* and *Document Author* are automatically recorded for it.

The sample MacroView Letter template also demonstrates the use of Content Controls, which make editing a document much safer. The screen shot below shows editing text in a Content Control called *Subject*. Adjusted text in a Content Control retains correct formatting and position and is available for recording as metadata.



Using a Content Control to edit Subject in a document generated using the MacroView Letter template

MacroView ClauseBank is available as an optional module of MacroView Case and Matter. With MacroView ClauseBank you can easily find and re-use standard approved text and graphics content in the Word document, Outlook email or PowerPoint presentation that you are preparing. ClauseBank prevents the retrieval of out-of-date content and preserves all styles, so that retrieved content is properly formatted. ClauseBank content is stored in a central SharePoint site, which makes it accessible via the web to suitably authorized users. Users can propose new content for the central ClauseBank by simply right-clicking on selected text / graphics and choosing *New Clause*.

MacroView has extensive experience with the creation of automated templates, and can either create new templates for your organization, or adjust your existing templates so that they are tightly integrated with the Case and Matter solution.

Work with Documents when I am Out of the Office

While Legal Department users generally prefer to do major drafting and amendment work using Microsoft Office on their Windows desktop in their office, there are also times when they need to access and work with documents when they are not at their desk. MacroView Case and Matter supports remote access and offline operation. A prototype mobile app is also available for iOS and Android devices.

MacroView Case and Matter supports all forms of authentication to a SharePoint environment, except anonymous access (because keeping track of who has accessed is important). The SharePoint document store can be registered to MacroView Case and Matter using its https: address. As a result you can work securely with documents and emails via an internet connection from a notebook or other PC that has the MacroView Case and Matter client-side components installed.

MacroView Case and Matter does not change how documents or their metadata are stored in SharePoint, which means that you can use the native SharePoint web browser to access your documents from a PC that does not have MacroView Case and Matter installed.

Favorites that correspond to SharePoint areas that can store documents (i.e. document libraries, document sets and folders) will appear in the *Mail Folders* pane of your Outlook, as well as in the *Favorites* mode of MacroView. If Outlook is Offline – e.g. because you are out of the office - you can drag and drop emails and / or attachments to these Favorite folders. When you are next connected to SharePoint, MacroView Case and Matter will complete the saving of these emails / attachments to the Favorite areas. This is the *Upload Offline Emails* feature.

Case and Matter also provides a right-click, *Take Offline* command, which checks out the selected document (or all the documents in a folder) and makes a copy of it on your C: drive, so that you can edit it while you are away the office. When you are next connected to the SharePoint environment you can use *Manage Offline Files* to have the modified document and any new documents loaded back to the Matter area. The uploaded documents are checked in as a new version.

Collaborate on Documents, including with External Parties

Legal users often need to collaborate with external parties as they work on documents. This collaboration can be done by attaching documents to emails. A preferable approach is to store the document in an extranet site or in a secure cloud store, so that all the parties can see and work on the same document, rather than email copies of the document.

MacroView Case and Matter users can save a document to an Enterprise File Sharing and Sync (EFSS) application such as One Drive for Business, Accellion, Box, Citrix ShareFile, etc. The document is then shared with other parties who need to collaborate on it. If One Drive for Business / SkyDrive Pro / SharePoint Workspace software is installed on the PC, right-clicking on a document, folder or document set (e.g. a Matter document set) will display a *Create a Synchronized Copy* option. Choosing this option will save a copy of the document to the EFSS service.

MacroView Case and Matter users can also save documents to their personal cloud store – such as DropBox, Google Drive, OneDrive etc. A right-click customization – e.g. *Save to My Personal Cloud* – can make saving more convenient.

Extranet sites that have been provisioned on SharePoint or Office 365 can be added into the tree-view display of MacroView Case and Matter. Users can then drag and drop to save and copy documents between the secure extranet site and the main on-premises SharePoint document store. As described above (see *Drag and drop to save documents and emails*) MacroView Case and Matter will retain version history and re-use metadata as it does such moves.

This [YouTube video](#) shows a customization for MacroView Case and Matter that automatically creates an extranet site hosted on Office 365 as a user right-clicks on a Matter storage area.

Automated Installation and Provisioning

Legal Department users are not SharePoint experts. They want a solution, not a box of components that need to be assembled with assistance from IT specialists. And as so many people have observed, SharePoint solutions can be tricky to get right.

The installation and provisioning feature of MacroView Case and Matter automatically creates a functioning legal document and email management solution, without any need for technical specialist involvement (other than the administrator of the SharePoint server environment). This provisioning includes the creation of a design for the SharePoint DM store that has been proven to be effective in other legal departments and similar environments.

However if necessary, the design can readily be fine-tuned – e.g. so that additional or different metadata is captured as documents are saved, so that search panels reflect that metadata, Views adjusted to display different details and / or different sort orderings, etc. MacroView can also adjust the available right-click menu options, to reflect the way a particular Legal Department prefers to work.

More Information

This [YouTube video](#) shows MacroView Case and Matter in action.

This article is also published as <http://macroview365.com/2016/01/25/the-solution-your-legal-department-has-been-looking-for/>

For more information on MacroView Case and Matter or other solutions available from MacroView contact solutions@macroview365.com.

